

Knowledge Base Article

Product Group: Software
Product: CMSW7200, CMSW7300, CMSW7400 - @ptitude Analyst
Version: All

Abstract

This article describes how to set up SKF @ptitude Analyst to allow the automatic creation of reports on network drives.

Overview

SKF @ptitude Analyst (including @ptitude Inspector and @ptitude Analyst for the Microlog Analyzer) has the ability to schedule reports to be automatically generated at specific times.

When assigned to the SKF @ptitude Analyst Transaction Service, this functionality can be run without any @ptitude Analyst clients being logged in.

The report generation functionality has the ability to store these reports on network drives, but only if the network drives have been set up beforehand as logical drives.

The following is a step-by-step process of how to configure the software to automatically generate reports to a network drive.

PROCEDURE

1. Set up the network directory (IT)
The first step is to have a network drive and directory identified. This is typically done through a request to the company's IT department. The network directory must be visible to the computer running the Transaction Service, and the account used to run the Transaction Service **must** have "write" access to that drive. This is critical for the functionality to work.
2. Set up a Logical Drive on the @ptitude Transaction Service computer (IT)
Once the drive has been identified and verified as being able to be written to by the computer and account where Transaction Service is running, then the drive needs to be set up as a "Logical Drive". One way to do this is via the NET USE command of Windows.

For example, if one wanted to assign the Logical Drive R: to the directory [\\NETWORK_COMPUTER\Common_Report_Directory](#), the command:

NET USE R: \\N_C\C_R_D /USER:U_A password

would be used where:

- N_C = The name of the Network Computer
 - C_R_D = The name of the Common Report Directory and
 - U_A = The user account used to connect to the network computer.
 - Password for logging in
- Please consult your current operating system manual for complete details of the NET USE command.

This command needs to be run every time the computer running the Transaction Service starts up. This can be done with a script or batch command.

In addition, when configuring reports in @ptitude Analyst, the @ptitude Analyst client must have the exact same Logical Drive setup as the one intended to be used by the Transaction Service.

3. Set up the @ptitude Analyst report to be generated (@ptitude Analyst ADMIN)
 Reports are created using the File > Reports... function. When adding a new report (or editing an existing report), the Report Editor dialog has an "Assign" tab. The network drive should be assigned using the Browse button. [Figure 1]

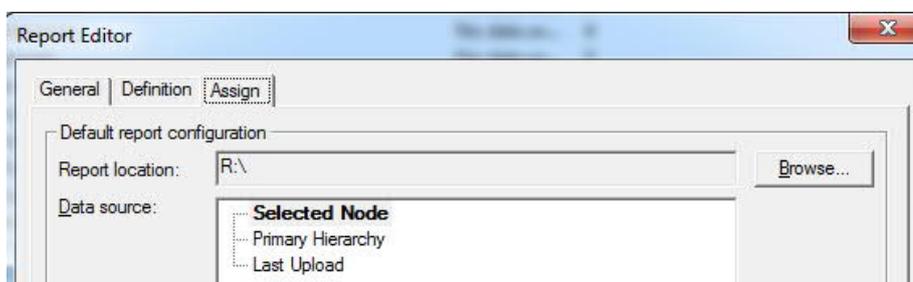


Figure 1. Browse button in Assign tab

NOTE: During the configuration of the report, the **exact** same Logical Drive needs to be set up on the computer running @ptitude Analyst as the computer running the Transaction Service.

4. Create the scheduled event (@ptitude Analyst ADMIN)
 Scheduled events are created through the Customize > Scheduler... function. New events can be created using the Add... button. [Figure 2]

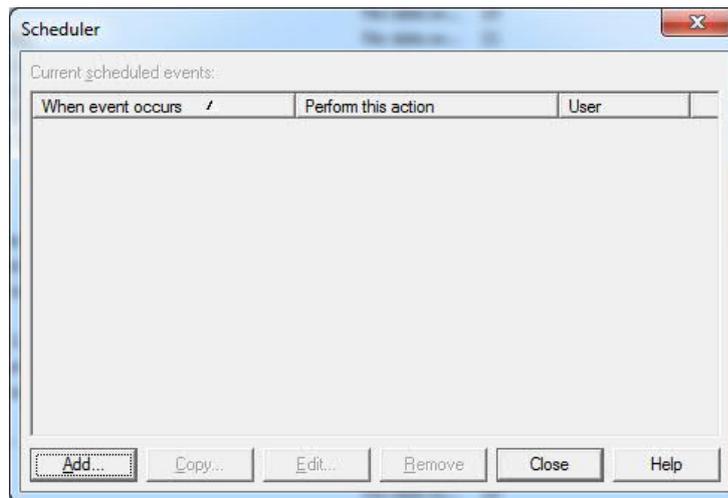


Figure 2. Add button in Scheduler dialog

This will launch the “Event Scheduler” wizard. The second page of the wizard allows for the selection of the event type. For example, if a report is desired to be created weekly, the first thing Monday morning, then the event type selected would be “At specified time”. [Figure 3]

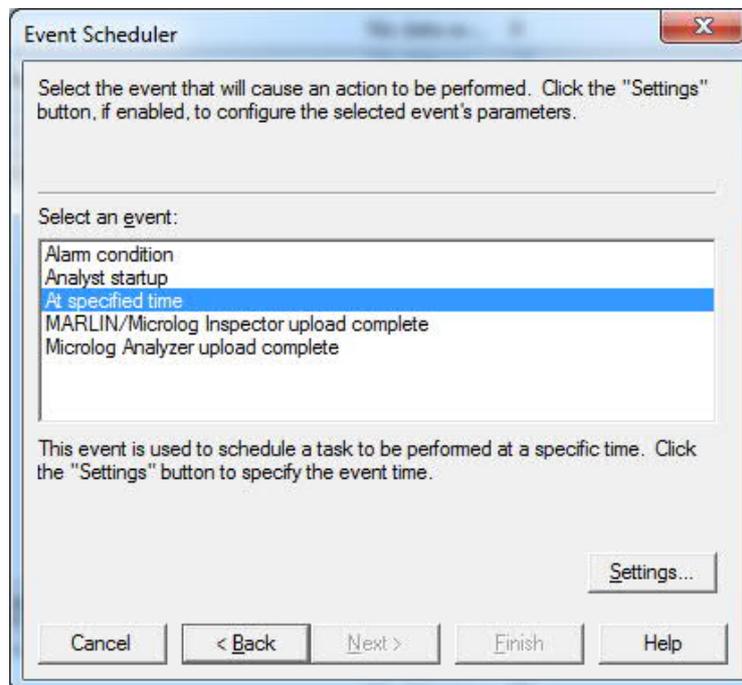


Figure 3. Event Scheduler configuration dialog

Once this event is selected, the parameters of the schedule can be set using the Settings... button. [Figure 4]

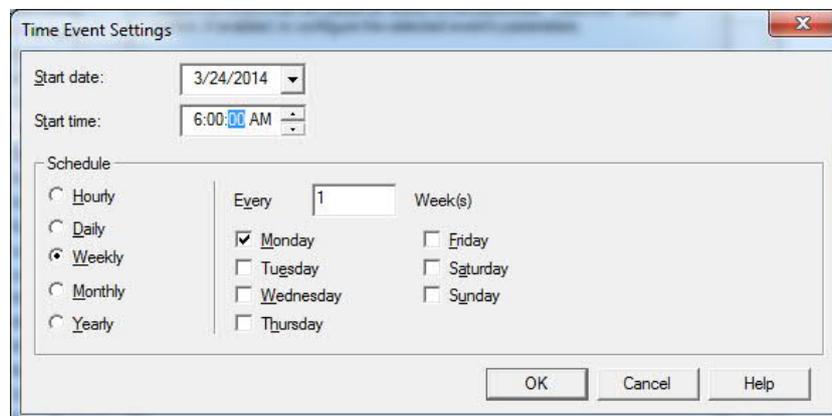


Figure 4. Time Event Settings configuration dialog

The event action can be selected from the next page. In this example, the action would be "Generate Report". [Figure 5]

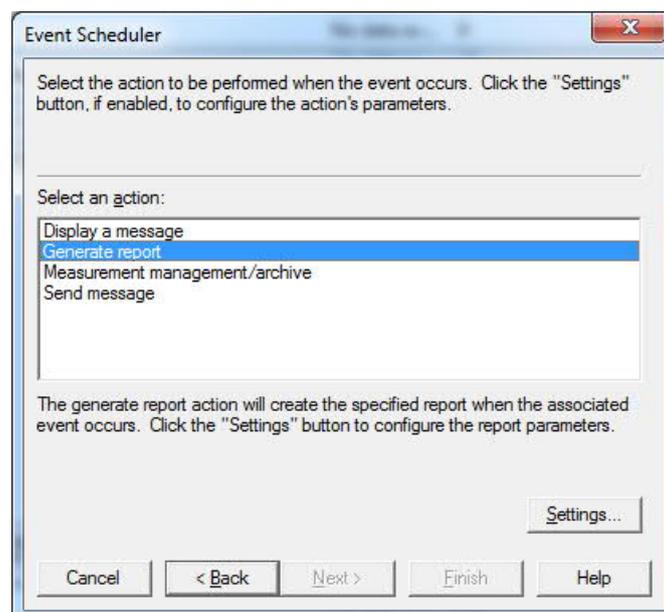


Figure 5. Selecting 'Generate report' as the action

Once this action is selected, the parameters of the report can be set using the Settings... button. [Figure 6]

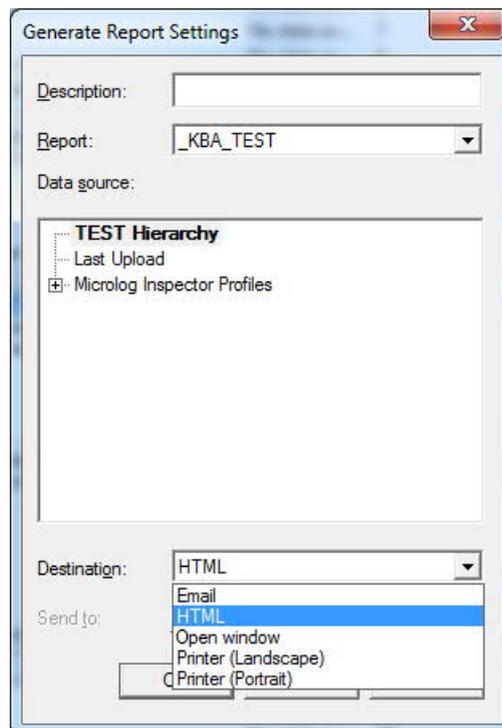


Figure 6. Generate Report settings

The report definition (along with the assigned logical network drive) is chosen, as well as the destination. When the report is run, it will appear on the network drive. If "Email" is selected as the destination, the recipients must be defined below it in the Send to field.

The final dialog allows the definition of who 'owns' this scheduled event. To allow the report to be automatically generated without the need for a @ptitude Analyst client to be running, the event can be delegated to the Transaction Server by checking the appropriate box. [Figure 7]

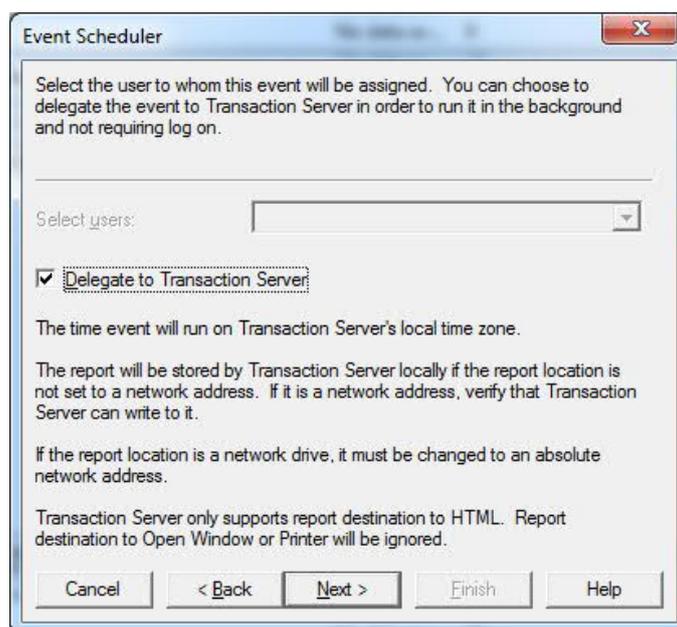


Figure 7. Event delegated to Transaction Server

Remember, the following conditions must be met:

- If the report location is set to a network address, verify that Transaction Server can write to it, as stated in step 1.
- If the report location is a network drive, it must be changed to the Logical Drive created in step 2.

For further assistance, please contact the Technical Support Group by phone at 1-800-523-7514 option 8, or by e-mail at TSG-CMC@skf.com.